DocuSign Instructions for Award & Incentive Payment Requests

These forms should be completed by the person who is authorized to request an award or incentive payment. If you are accessing these forms, you have an award recipient who needs to be paid. You must complete one form per award recipient.

Completing the payment request form in DocuSign is the first part of a two-part process. Once completed, the DocuSign form will need to be saved as a pdf and attached to the supplemental payment request in OneUSG Connect.

Please read these instructions in their entirety before proceeding to DocuSign to complete the form. For your convenience, keep the following instructions visible as you complete the form.

Before you begin, you will need the following employee information to complete the form.

- Employee’s Legal Name (Use name listed in PeopleSoft. Do not use nicknames)
- Employee ID
- Home Department Number (i.e. 820)
- Worktag for Payment
- Employee’s Annual Salary
- Employee’s Pay Frequency

Accessing DocuSign

When you are ready to start, login to DocuSign using one of the two options below.

Option 1:
Click the appropriate form link below. It will direct you to DocuSign to login.

<table>
<thead>
<tr>
<th>Payment Request Form Links</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continuous Service Separation</td>
</tr>
<tr>
<td>Critical Skills Retention</td>
</tr>
<tr>
<td>Employee Suggestion</td>
</tr>
<tr>
<td>Exceptional Performance Incentive</td>
</tr>
<tr>
<td>Goal-Based Incentive</td>
</tr>
<tr>
<td>Student Award</td>
</tr>
</tbody>
</table>
Option 2: Access the shared Incentive & Award Request forms within DocuSign.

(1) Go to the Georgia Tech eSignature site: esignature.gatech.edu
(2) Login to DocuSign using your Georgia Tech credentials
(3) Navigate to the Incentive & Award forms under the Templates section: Templates/Shared Folders/_Employees/Human Resources/HR Finance.
(4) If you use this option, skip to Step 2 below.

Important: These are the official Georgia Tech Human Resources (GTHR) Incentive & Awards payment request form templates. No other versions should be created, used or shared. Questions regarding awards and incentives should be directed to awards@lists.gatech.edu.

Completing the Form
The following steps will guide you through the completion of the

Step 1:
You will be required to log into DocuSign. Please use your standard GT login i.e. gburdell3@gatech.edu.

Using your GT login will allow you to track the progress of everyone who has been asked to sign your form within your DocuSign account.

Step 2
The selected form will open. Select the blue “USE” button to begin.
Step 3

For each Georgia Tech recipient, please choose the address book icon to ensure the recipient signs in with Georgia Tech credentials. This will allow them to track the progress of your document and access your request in DocuSign.

If a recipient is not optional or not required (e.g. Committee member), remove this routing entry by clicking the “X” to the right of the recipient box.

Once you remove a recipient the form will ask if you wish to proceed by also eliminating any fields assigned to that person.
Select “DELETE”

**Step 4**

**IMPORTANT:** Include the award recipient’s name in the subject line of your email. You will need to type that in manually. Including the employee’s name lets recipients know who the request is for.

**Step 5**

When you scroll to the bottom of the screen, you will see a check a box to create custom email and language for each recipient. If you wish to send customized messages, check the box and write an email message.
Step 6

Once you have entered all required recipients and any optional email message information, select “SEND.”

After clicking SEND, the document is electronically routed via email to each recipient. You, as the sender and first recipient, will complete the form in DocuSign (via the email link you receive or in your DocuSign account).

When you complete the form, you will notice the other recipients’ names are not yet listed on the form. However, their names will autofill when they open the form.

When all recipients have finished signing the document, everyone will receive a PDF copy of the signed form via email attachment. Save the attachments since DocuSign only retains documents for 6 months.

For questions about the award payment process please contact: awards@lists.gatech.edu